Manage Tasks, Assignments, Steps, and Timers

A complete guide to task access, assignment, provider requests, task types, progress fields, comments, client instructions, timers, Work Diary review, secure boundaries, troubleshooting, and completion verification.

VERSION	1.0	AUDIENCE	Admins, managers, employees, providers
FORMAT	Website + PDF	UPDATED	July 2026

Every person, practice, patient, task, payer, timer, screenshot, and count shown in this guide is fictional. Never use live patient, provider, employee, credential, password, token, or unredacted third-party data in training material.

Contents

Select any section in supported PDF viewers. Use the Contents link in the upper-right corner of every content page to return here.

How to use this guide
Read access and task-record rules first. Then study create, assignment, provider request, progress, comments, timers, Work Diary, boundaries, troubleshooting, and completion verification.

01 / PURPOSE

Use Tasks to plan, assign, execute, and verify work

Purpose	What it means
Plan	Create a work item with outcome, client context, type, due date, priority, and status
Assign	Route the task to a client, optional team, optional employee, and optional supervisor
Execute	Use instructions, progress fields, comments, timers, and task history while work is active
Verify	Confirm source save, progress, stopped timer, final status, and communication before close

> Tasks are not the source record
> Confirm payer responses, patient context, payments, credentialing state, reports, files, and official audit history in the owning module.

02 / ACCESS

Confirm page access, role behavior, and tenant scope

Account	Current behavior	Boundary
Admin / Super Admin / Manager	Create and edit tasks. Admin and Super Admin see delete in the UI; API also supports manager-authorized deletion.	Current organization and authorized rows
Employee / internal	Works direct, legacy, supervised, or team-assigned tasks.	Assignment scope plus API/RLS
Provider / client / external	Submits focused pending requests and can add questions or notes on authorized progress.	Portal scope and practice assignment

> Page access is not action authorization
> A visible Tasks page, button, local role check, or filter is not a security boundary. API and RLS must enforce organization, practice, assignment, operation, file, log, and screenshot access.

Review roles, permissions, and access boundaries

03 / TASK RECORD

Understand the fields before editing

Field	Use it for	Avoid
Title	Short operational outcome	Sensitive data or full patient details
Description	Context and source location	Replacing the source record
Client/provider	Required internal client context	Wrong practice/client selection
Task type	Dynamic progress fields	Leaving type blank
Assignment	Team, employee, supervisor ownership	Broadcasting unclear work
Status/priority	State and urgency	Using priority instead of due date or blocker note

04 / COMMAND CENTER

Use the task workspace without losing context

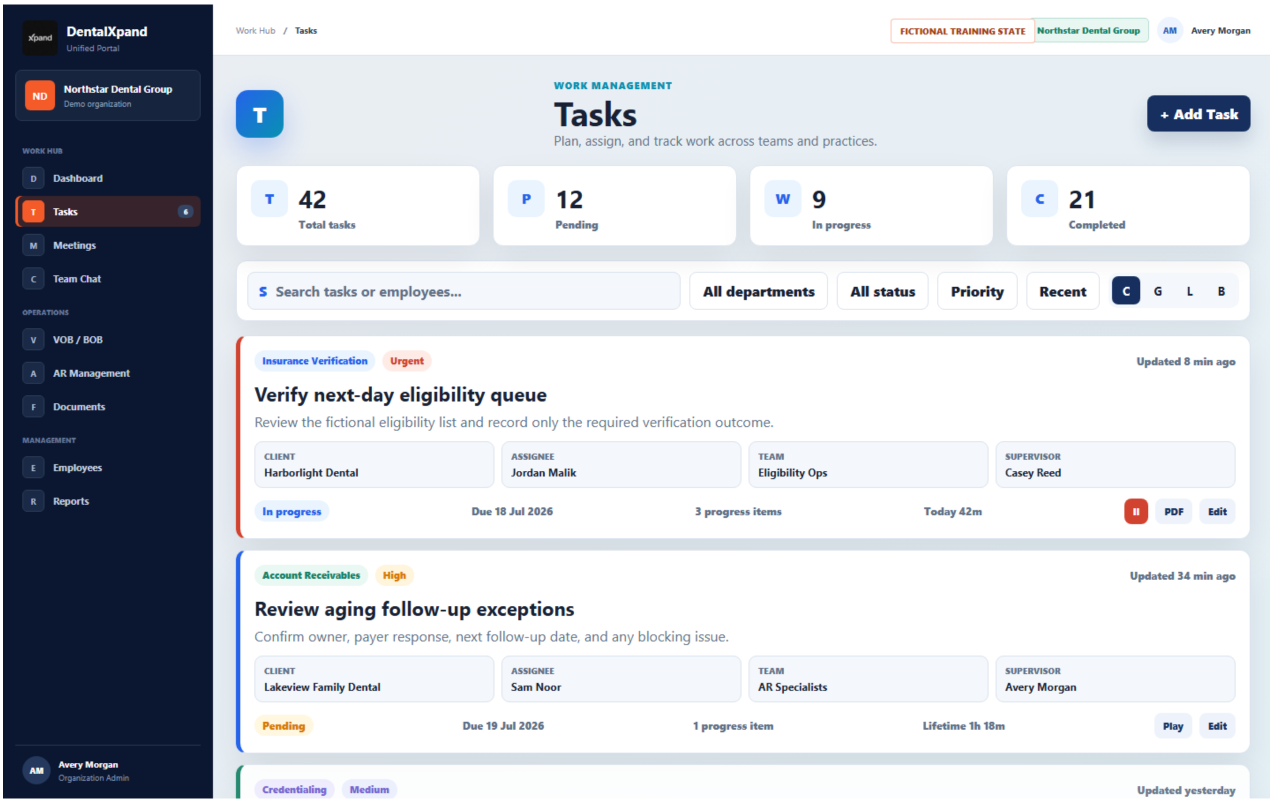

Figure 1. Fictional Tasks command center with summary cards, search, filters, views, assignment details, progress counts, timer state, and actions.

> Read the card before acting
> Confirm client, assignee, team, supervisor, due date, priority, status, progress count, and time before changing ownership or status.

05 / FIND, FILTER, SORT

Narrow the authorized task set

Control	Current behavior	Before reporting missing
Search	Checks title, description, employee, team, and supervisor names	Clear spelling and old employee names
Department	Matches assigned employee, supervisor, or team department	Confirm direct, supervised, or team assignment
Status	Filters pending, in progress, completed, cancelled	Clear status before looking for closed work
Priority	Filters blocker, critical, urgent, high, medium, low, lowest	Check exact saved value
Sort	Recent, oldest, or Title A-Z	Use search when the list is still long

06 / VIEWS

Use Classic, Grid, List, and Board

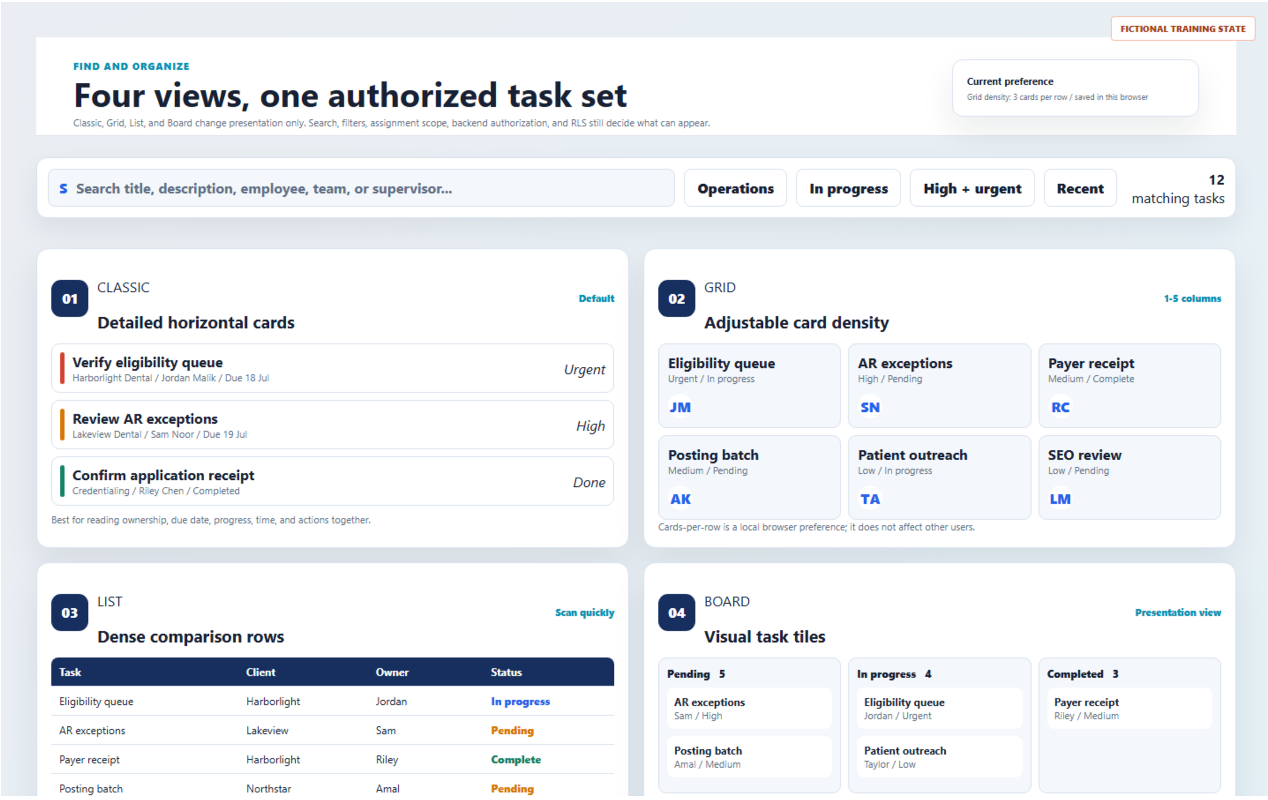

Figure 2. Fictional comparison of Classic, Grid, List, and Board task views with search, filters, sort, and browser-local grid density.

View	Best for	Important rule
Classic	Reading ownership, dates, status, progress, time, and actions together	Default detailed workflow view
Grid	Visual scanning with 1-5 cards per row	Density is saved in this browser only
List	Dense comparison across many tasks	Use row actions for specific tasks
Board	Presentation by status tiles	Current Board is not the status-change mechanism

07 / CREATE TASK

Create work with a clear outcome and ownership path

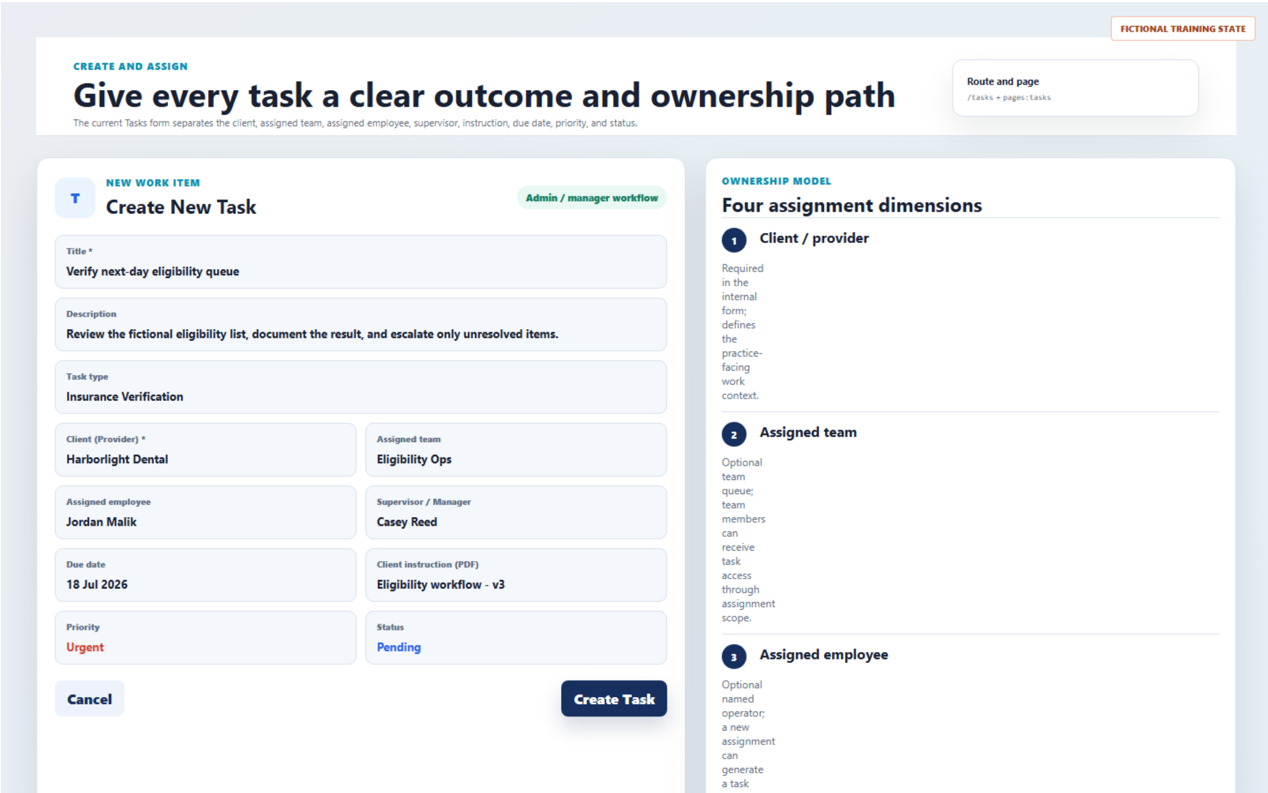

Figure 3. Fictional internal task creation form showing title, description, type, client, team, employee, supervisor, due date, instruction, priority, and status.

1 Write the title as a short outcome without sensitive data.

2 Use description for enough context and source location.

3 Select the task type so progress fields work later.

4 Select the correct client/provider before selecting an instruction.

5 Assign team, employee, and supervisor only where they match responsibility.

6 Set due date, priority, and starting status from the approved workflow.

08 / ASSIGNMENT

Use client, team, employee, and supervisor deliberately

Dimension	Purpose	Operator check
Client/provider	Required internal task context	Match the source record and practice
Team	Optional queue and team access route	Use only when a team truly owns the queue
Employee	Named operator	Prefer a clear accountable owner
Supervisor	Oversight owner	Use for review/escalation path, not broad visibility
Notifications	Assignment/supervisor changes can notify users	Do not create noisy reassignment churn

Assignment is not a broadcast
Do not use broad teams or supervisors as a workaround for unclear ownership. Name the expected operator when possible.

09 / PROVIDER REQUESTS

Treat portal submissions as review intake

Portal request	Current behavior	Admin response
Title/description	Entered by provider or client	Review for clarity and sensitive data
Task type	Selected by requester	Confirm it matches the workflow
Status	Pending	Triage before changing
Priority	Medium	Adjust only after verification
Tags	client_request and pending_approval	Use as intake context only

Continue to provider login and the client portal

10 / STATUS AND PRIORITY

Separate state, urgency, time, and blockers

Status/priority	Meaning	Use with
Pending	Queued or waiting for approval/start	Owner, due date, and prerequisite
In progress	Work has started; timer start can move pending task here	Progress and time tracking
Completed	Work is source-verified and finished	Stopped timer and final comment
Cancelled	Work should not continue	Reason and safe context
Blocker/critical/urgent/high	Attention level	Due date and explicit blocker note
Medium/low/lowest	Normal or lower attention	Normal queue rules

11 / TASK TYPES

Choose the type that unlocks the right progress form

Task type	Progress depth	Rule
Insurance Verification	Rich verification fields	Use payer/source values
Payment Posting	Posting totals and remarks	Match payment source
Account Receivables	Follow-up and status details	Verify claim/account state
Credentialing	Application/payer follow-up fields	Match provider and payer case
SEO / Social Media	Campaign and review notes	Keep approved channel context
Prior-Authorization, Patient Communication, Call Center, Other	Mostly remarks-style progress	Keep enough source-backed detail

No task type means no structured progress form
Edit the task and choose the correct type before expecting guided fields.

12 / CLIENT INSTRUCTIONS

Attach and preview the correct workflow PDF

Instruction choices are filtered by the selected client. Attach the current approved instruction for the client and workflow, then preview it from task progress before recording work.

> Instruction version matters
> Wrong-client or stale instruction PDFs can make accurate work look incorrect. Confirm the client before selecting the instruction.

Continue to client instructions and workflow PDFs

13 / PROGRESS HISTORY

Read progress before adding another update

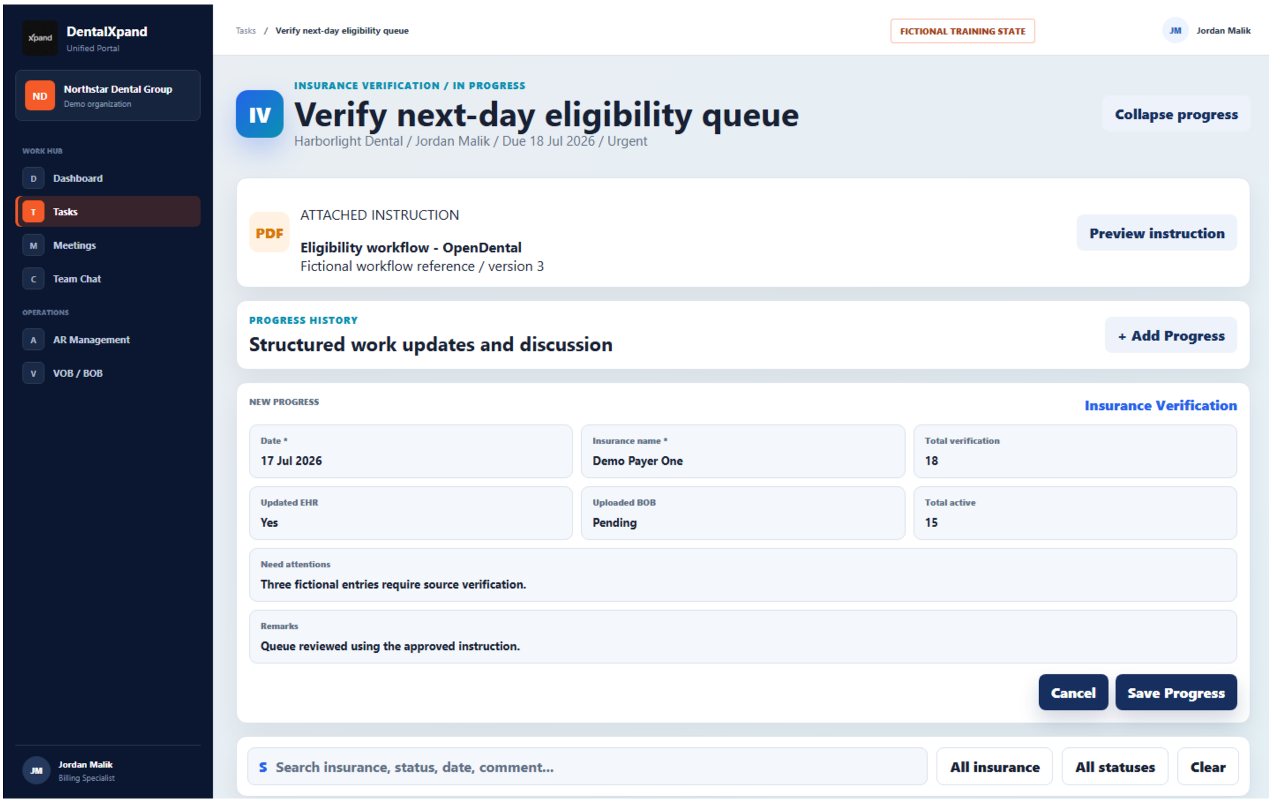

Figure 4. Fictional expanded task with attached instruction, dynamic progress form, progress filters, grouped history, and social-style comments.

> Latest is open by default
> The newest date group is expanded for fast review, but older history remains part of the task record.

14 / ADD PROGRESS

Save source-backed structured work

1. Confirm task type, client, instruction, status, and assignment before adding progress.
2. Use the dynamic fields shown for the selected task type.
3. Search or filter existing progress first to avoid duplicate updates.
4. Save remarks that explain the work without copying sensitive unrelated data.
5. Treat progress-step deletion as exceptional and irreversible.

> Provider users do not add internal progress
> Portal users can ask questions or add notes on authorized progress items, but the current interface does not show Add Progress or internal status choices to them.

15 / COMMENTS

Use saved discussion as part of task history

Comment area	Saved context	Do not include
Internal comment	Author name, email, role, time, text	Passwords, tokens, full PHI, unrelated files
Provider/client note	Question or note on authorized progress	Internal-only status decisions
Fallback discussion	A discussion step can be created when no progress exists	A replacement for structured progress

Comments are operational records
Use them for blockers, clarifications, and safe next steps. Do not use them as private chat or a place to store secrets.

16 / TIMER

Start, pause, stop, and complete time accurately

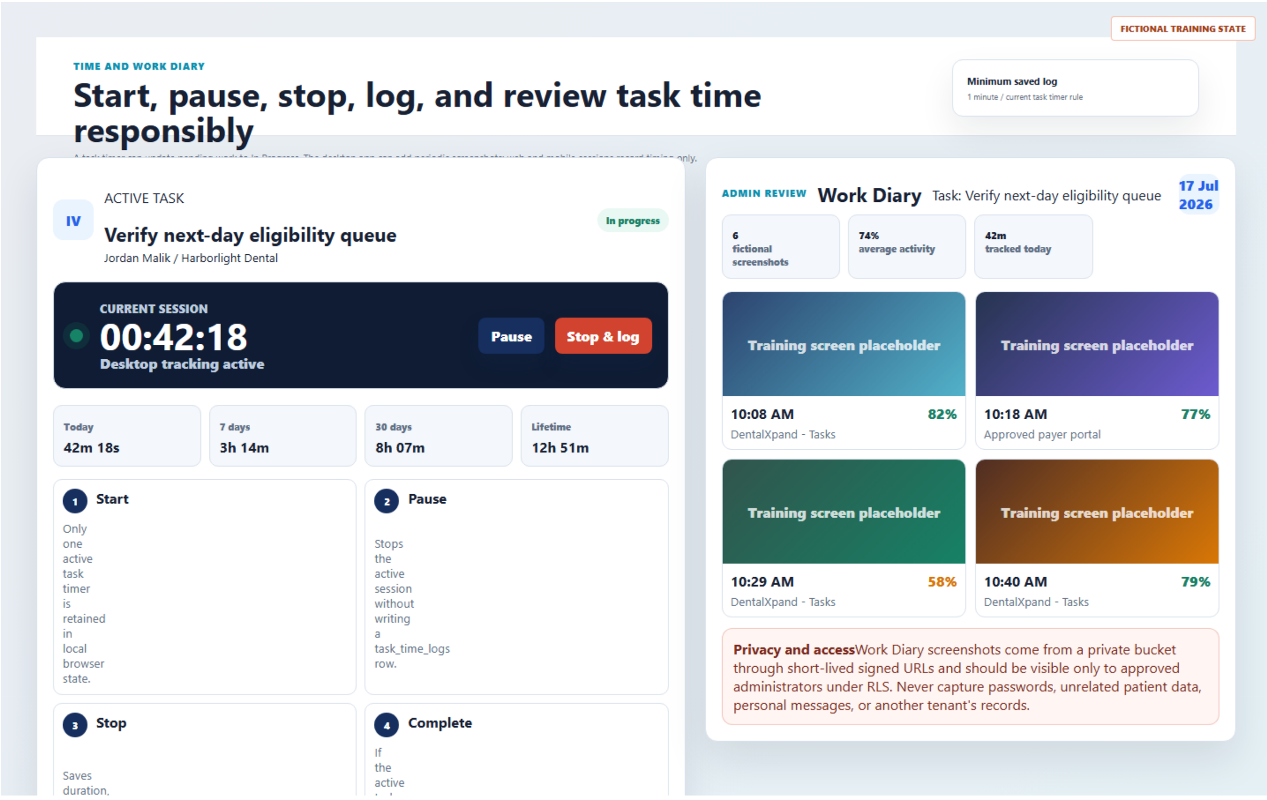

Figure 5. Fictional timer and Work Diary view showing active session, stop and log, time summaries, screenshot placeholders, and privacy guidance.

Action	Current behavior	Correct use
Start	Stores one active task timer locally and can move pending task to in progress	Start only when real work begins
Pause	Stops active state without writing a log row	Use for interruptions that should not save as work
Stop	Saves task_id, employee_id, duration, start/end when at least 60 seconds elapsed	Stop before switching or completing
Complete active task	Attempts to stop/save timer first	Confirm time log before relying on reports

17 / TIME LOGS

Understand summaries and timer setup states

- Today, seven-day, thirty-day, and lifetime summaries help the user understand effort.
- Admins and managers can review authorized logs; non-admin users see their own logs.
- Provider and client users do not use task timers in the current interface.
- If the schema is missing, the timer can return a setup warning or empty logs. Do not invent time.
- Task total_time_seconds is attempted when a log is saved, but reports should still be verified against logs.

18 / WORK DIARY

Review desktop evidence with privacy discipline

The time tracker heartbeats about every 45 seconds, marks idle after about five minutes, and captures desktop screenshots about every ten minutes with a small timing variation. Desktop app sessions can capture screenshot and active app/window/URL; web and mobile sessions are timing-only.

> Work Diary is sensitive
> Screenshots should come from private storage through short-lived signed URLs and be visible only to approved administrators under RLS. Avoid passwords, unrelated patient data, personal messages, and cross-tenant screens.

19 / REALTIME

Know what live updates can and cannot prove

Subscribed source	Why it matters
tasks	Task status, assignment, fields, and list refresh
task_time_logs	Timer totals and work diary context
employees / teams / team_members	Assignment names and team visibility
providers	Client/provider labels and portal context
client_instructions / versions	Instruction availability and current workflow references

> Realtime is freshness, not proof
> Open task history and the source module before deciding who changed a record or why a number moved.

20 / ACCESS BOUNDARIES

Protect tasks, steps, comments, time, files, and screenshots

Figure 6. Fictional access flow showing authentication, tenant, page permission, assignment query, backend/RLS, lifecycle, and incident states.

> Cross-tenant data is an incident
> If another Guardian Connect, DentalXpand, provider, practice, patient, employee, task, comment, instruction, timer, AI answer, or Work Diary item appears in the wrong tenant, stop, avoid opening more records, sign out, and report immediately.

21 / SAFE LIFECYCLE

Run the task from intake to close

1. Confirm account, organization, client/provider, and source module.
2. Define the outcome, task type, due date, priority, and starting status.
3. Assign team, employee, supervisor, and instruction only where needed.
4. Open the instruction and source record before saving progress.
5. Start the timer only for actual work.
6. Record progress with structured fields and safe comments.
7. Discuss blockers inside the task without exposing unrelated data.
8. Stop timer, verify source save, update status, and leave final context.

22 / TROUBLESHOOT

Respond to expected states correctly

State	Possible reason	First response
No matching tasks	Filters, status, priority, assignment, team, organization, or RLS	Clear filters and confirm assignment/scope
Cannot create	Current UI role gate, action denial, backend, or RLS	Confirm exact least-privilege need
No progress fields	Missing/unsupported task type	Edit task and select correct type
Instruction missing	Wrong client or no current instruction	Confirm client and instruction version
Timer setup warning	Missing schema/setup	Report setup message; do not invent logs
Provider cannot change status	Portal view intentionally limited	Admin/manager triages after verification
Access denied	pages:tasks, assignment, API, or RLS	Return to authorized page and request least privilege

23 / DELETION

Use deletion only when policy allows it

The current UI shows task deletion to Admin and Super Admin users, while the API path also allows managers. Progress-step deletion is exposed to Super Admin in the UI and requires confirmation. Treat both as exceptional actions.

> Prefer completion, cancellation, or correction
> Delete only when the business owner understands the impact on history, comments, time logs, reporting, and client communication.

24 / DAILY WORKFLOWS

Use role-fit routines

Role	Daily routine
Admin / Manager	Review pending and overdue work, triage provider requests, assign owners, review time/Work Diary where authorized, and verify closure
Employee / internal	Open assigned tasks, preview instructions, start timer when working, save structured progress, comment on blockers, and stop timer before close
Provider / client	Submit focused requests, review authorized progress, ask questions, and avoid internal status or assignment assumptions

25 / COMPLETION

Verify that this lesson is complete

- I can confirm account, tenant, client, and pages:tasks before using Tasks.
- I know current role behavior for admin, manager, employee, and provider/client users.
- I can create a complete internal task without sensitive title data.
- I understand direct assignee, team assignment, and supervisor oversight.
- I know provider/client requests are focused pending intake items.
- I can use search, filters, sort, and all four views correctly.
- I know task type controls dynamic progress fields.
- I can attach and preview the correct client instruction.
- I can add source-backed progress and safe comments.
- I can start, pause, stop, and complete timer work accurately.
- I understand Work Diary screenshots and privacy limits.
- I can distinguish no-match, missing-instruction, timer setup, access-denied, and cross-tenant states.
- I know deletion is exceptional and potentially irreversible.

26 / CONTINUE

Continue through DentalXpand learning

Previous lesson	Next lesson	All resources
Previous lesson	**Next lesson**	**All resources**

Related lessons

- Navigate sections and pin frequent tools
- Understand roles, permissions, and access boundaries
- Understand organization and practice context
- Client instructions and workflow PDFs
- Provider login and the client portal

Website guide: Manage tasks, assignments, steps, and timers
Support: support@xpand.dental
Website: xpand.dental